



Tax Return Drop-Off Information Form

Please complete the following questions and include this form inside the folder with your tax documents to ensure timely preparation of your tax return.

*****Information provided to us on your tax return must match what the IRS has on file to avoid processing delays.**

Taxpayer Name _____ Taxpayer Occupation _____

Spouse Name _____ Spouse Occupation _____

Social Security Number – Taxpayer _____ Spouse _____

Phone _____ Spouse Phone _____ Email _____

Address _____

City _____ State _____ Zip Code _____

Marital Status at end of 2023: Married

Married filing separately (please include legal separation documentation)

Single

Widow(er) If spouse died in 2023, please include date of death _____

YES NO – All questions should be answered for Tax Year 2023 and proper documentation provided.

Are you a new client? If yes, please include a copy of your most recent tax return, Driver's License, and Social Security Card for you and any dependents.

Do you have all your income documents? W-2, 1099-SSA (Social Security), 1099-NEC (for independent contractors), etc.?

Did you have any changes in dependents during the year? If yes, explain: _____

Did you pay for any child or dependent care during the year? If so, please include receipts.

Did any member of your household have healthcare coverage through the Marketplace? If so, please include copy of 1095-A form.

Did you claim unemployment benefits? If yes, please include form(s) 1099-G for 2023.

Did you receive, sell, exchange, or dispose of any virtual currency in 2023?

Did you buy or sell any stocks, bonds, or other investments in 2023?

PLEASE SEE REVERSE FOR ADDITIONAL QUESTIONS

YES NO – All questions should be answered for Tax Year 2023.

- Do you have any interest in or authority over any foreign account or foreign trust?
- Did you take any money out of retirement? IRA, 401k, etc. If yes, please include form 1099-R.
- Did you take money out of your Health Savings Account (HSA)? If yes, please include form(s) 1099-SA. Was this money used for medical expenses? Yes No
- Did you pay tuition or other education expenses for yourself or a dependent? If yes, please include form(s) 1098-T.
- Are you a veteran from the United States military?
- Did you have any energy-efficient expenses in 2023?
- Are there any other extenuating circumstances that occurred in 2023 that we may need to know in order to prepare your taxes? If yes, please explain below (Ex: sale of primary residence or other real estate, birth of a child, marriage/divorce, other income not included in your documentation, energy-efficient improvements, etc.)** _____

- If your return produces a refund and you would like direct deposit, please include the information below:
 - My direct deposit information is the same as last year and already on file. **Please include name of the bank** _____
 - I have changed banking information or am using direct deposit for the first time. Please include information below:
Name of Bank _____
Routing Number _____ Account Number _____
- If your return produces a refund, would you like your tax preparation fees withheld from your refund? If preparation fees are not withheld from your refund, fees are due in full before your return can be filed. **Please note – we have to use the services of a refund bank in order to facilitate the fee withdrawal, so there is an extra fee incurred with this option. **If you have elected to have your fees withheld, please answer the following security question –***
What high school did the taxpayer attend? _____

Please indicate below how you would like to receive your client copies.

- PDF copy uploaded to your client portal
- Printed Copy

As always, thank you for the opportunity to be of service. We appreciate your patience and support!

We will be in touch soon!

The Staff of ABT Tax Service